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ABSTRACT

This report of the 95-member Council for the Comprehensive Plan for Libraries, which included representatives from government, libraries, and the public sector, is not intended to answer all the questions for all those concerned about the future of libraries, but rather to bring focus to the issues and to set a direction for solving the problems libraries are facing. It is comprehensive because it attempts to look at a variety of concerns facing all types of library resources in Pennsylvania. The goal of the study, which was undertaken in October 1981, was to review the major issues of resources, technology, and access which affect the users of libraries. In February 1983, the State Library sent out 4,308 questionnaires--of which 32% were returned--to sample members of various organizations and interest groups represented on the Planning Council to ascertain their reactions to the proposed courses of action. After choosing the most important and politically feasible courses of action, the Planning Council reached consensus on the 19 recommendations that became the basis of this plan. This report divides the final recommendations into three broad areas: quality of service, materials and resources, and management practices. Eight appendices provide further details about the study and the library survey form. (DMC)

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Comprehensive Plan for Library Service in Pennsylvania

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Recommendations for Improved Access to Library Resources in Pennsylvania

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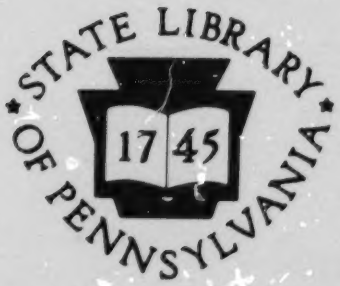

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Foreword

There is great satisfaction in being able to report that the task assigned to the State Library by Governor Dick Thornburgh in October of 1981 -- to develop a Comprehensive Plan for Library Service in Pennsylvania -- has been completed.

For the past two years the committees charged with specific issues, the Steering Committee and the full Planning Council composed of 90-plus concerned and interested individuals from the worlds of government, libraries and the public sector, have met, deliberated and honed the courses of action in this report.

It has been an honor and a privilege to work with so many men and women who have given so freely of their time, their professional expertise and their common sense to this important effort. I must add, too, my thanks to the State Library staff members whose assistance in coordinating and guiding the Council's work proved so invaluable.

This is an era in which three factors have come to bear heavily on all public services:

-- Government agencies, especially educational institutions, are being called upon as never before to respond to the economic and educational needs of our society.

-- Traditional methods of providing needed services are being reassessed to see how the technologies of lasers, microcomputers and video discs, to name but a few, can be used to deliver service more effectively and more efficiently.

-- Economic pressures force the questions of "How much will it cost?" and "Who will pay for it?" to the tip of everyone's tongue. Those who slice the fiscal pie at all levels of government and those who provide the ingredients of that pie, the taxpayers, are hardpressed to meet the needs of all who want a wedge.

Library service, of course, is not exempt from these influences and in the deliberations of the Planning Council, these pressures were not ignored. How can we improve the access that Pennsylvanians have to the library and information resources they need in a society where the information base is rapidly expanding, where technological change demands creative new approaches, and where every dollar must be more productive than ever before?

The information explosion is a special challenge to libraries. As Dr. Thomas J. Galvin, Dean, School of Library and Information Science,

University of Pittsburgh, reminded us so eloquently in his keynote address at a Planning Council meeting:

The fact is that the world of information has grown very large and very complex. It is also expanding so rapidly that it sometimes defies our best efforts to comprehend it and to categorize it. In fact, the place of information in our society has already expanded to the point where the social economist, Marc Porat, maintains that almost half of the U.S. labor force and more than half of the U.S. gross national product today derive from information-related work.

Libraries have traditionally been a source of information, education, culture and entertainment for the student or the general public as well as an essential resource for scholars and researchers. The library's role as a place where young and old can come to tap the books and magazines that inspire the mind and stretch the imagination cannot be lost. Libraries have new challenges in this rapidly changing technological age.

The school library media centers must teach the information access skills needed in a society where traditional resources such as encyclopedias, reference books and other information files will be accessed through computer terminals in schools, libraries and at home. No student should be able to finish formal schooling without the fundamental skills necessary to keep up with the changing world. The school library media center must be able to access the resources of other libraries so that students, teachers, and administrators will be able to use the appropriate resources from any of Pennsylvania's libraries.

The public libraries must expand their role as access points to Pennsylvania's wealth of library and information resources. They must develop their role as providers of information to the business community and assist in the transfer of technological development and innovation to all segments of society through the information and resources they provide. The means must be obtained to enable public libraries to continue to provide the free access to information resources which is essential in a free society.

The college and university libraries must find new ways to organize and disseminate information. No longer is it enough to provide students and faculty access to the information within the four walls of that institution's libraries. Scholars and researchers are already demanding more and other information material regardless of where it is housed and who owns it. Furthermore, the ability of computer terminals to access remote files makes it possible to search a library's holdings without ever entering the building.

The special libraries' challenge is not unlike that of the academic library or the public library. Their role in technology transfer, that of searching the published information and other resources for the latest developments in a field and making them available to the library's institutional or corporate clientele, becomes more critical every day.

How do we meet these challenges of the future and continue to fulfill the responsibilities of today? How do we develop the expertise and the financial support to become the point of access for the information, cultural and educational resources needed in our schools, communities, and institutions? This report of the Council for the Comprehensive Plan for Libraries is not intended to answer all the questions for all those concerned about the future of libraries, but rather to bring focus to the issues and to set a direction for solving the problems libraries are facing. It is comprehensive, not because it deals with all the concerns facing libraries; but because it attempts to look at a variety of concerns facing all types of library resources in Pennsylvania.

It is important to remember as this document is read and discussed, that the 19 courses of action in this Comprehensive Plan are not ends in themselves. They are beginnings. Our real challenge is how we move to assure that all Pennsylvanians have access to the materials and information needed in the decades ahead.

- Elliot L. Shelkrot
State Librarian

Introduction

The involvement of many people from all over the Commonwealth was very impressive. Many people worked hard to bring about a plan that will benefit all parts of Pennsylvania.

Rev. Msgr. Vincent L. Burns

Barbara Kastle, Donald Eddy

Perspective

"My library was dukedom large enough." William Shakespeare, in "The Tempest."

A probing look at the state of library services in Pennsylvania -- either a general overview or targeted on specific areas of concern -- is not an unprecedented activity. Out of such studies have come suggested changes in emphasis and direction, a new focal point for action by government and a spur to thought, not only by library professionals at all levels but also by a variety of public groups with a stake in the future health and effectiveness of libraries in the Commonwealth.

In the past quarter century, there have been a number of key library studies in Pennsylvania. Following is a summary of some of their goals and some major achievements:

1958 -- "Library Services in Pennsylvania, Present and Proposed," prepared by Lowell A. Martin, Rutgers University Graduate School of Library Studies: This survey, requested by Governor George M. Leader, led to the establishment of the present system of state aid for public libraries. Noting that many Pennsylvanians had inadequate access to basic or specialized library service, Martin set a goal of every Pennsylvanian having "a day-to-day library within 15 to 20 minutes... a subject library and professional expertise within an hour...a research library within a day." As a result of his recommendations, legislation establishing local libraries, District Library Centers and Regional Resource Centers was drafted and enacted in 1961.

1962 -- "A Study and Recommendations of Library Districts in Pennsylvania," prepared by the Institute of Public Administration under the direction of Dr. Kenneth E. Beasley: The Library Code, enacted in 1961, required determination of the boundaries of District Library Centers, which were to provide leadership and advice for local libraries, and improve access to resources. As a result of Beasley's study, 30 libraries were designated as District Library Centers (the number and make-up of the centers have changed through the years, however).

1967 -- "Progress and Problems of Pennsylvania Libraries; a Resurvey," prepared by Lowell A. Martin: In this follow-up survey, Martin noted progress in achieving the goals of the 1958 study but detected some weaknesses. Out of this second study came a still-not-fully-realized thrust for county and multi-county library systems, a spur to development of five-year plans by District Library Centers, state level consulting assistance to the District Library Centers

rather than to local libraries, and increased funds for the Regional Resource Centers.

1971-1974 -- "Pennsylvania Library Master Plan Committee Report," prepared by the Pennsylvania Library Master Plan Committee: This look at statewide library developments was prompted by a Pennsylvania Library Association resolution. The recommendations included: 1) increased state aid to public libraries; 2) the placement of the Division of School Libraries under the administration of the State Library; 3) legislative authority for the State Library to promote and assist cooperation among different types of libraries; and 4) development of a plan for coordinating continuing education for library and related personnel.

1975-1976 -- "A Plan for Library Cooperation in Pennsylvania," prepared by a team from Drexel University's Graduate School of Library Science, headed by Prof. Charles Meadow: This plan recommended increased State Library support for including data about Pennsylvania library collections in a national computer-based catalog, development of a more liberal interlibrary loan code, evaluation and increased support of a statewide library delivery system, and introduction of the legislation which was passed in 1981 to broaden State Library responsibility in support of interlibrary cooperation.

1977-1978 -- "Bibliographic Access in Pennsylvania," prepared by the Pittsburgh Regional Library Center: This study was commissioned to determine the need for State Library financial support to enter the holdings of Pennsylvania libraries into a national computer data base, as a means of increasing access to information in our libraries, and to survey interlibrary loan activities to assess the effectiveness of existing means of determining "who owns what."

Although many of the recommendations of these studies and plans have been implemented, not every recommendation for change comes to fruition. Factors change, political realities are dealt with and the reactions of professional and public constituencies are considered. But the net result has been a positive one -- a revitalization of library services, a charting of new courses, mid-course corrections to better achieve the intended goals and a review of those goals in the light of changing times.

This Comprehensive Plan, while building on the previous endeavors, is somewhat broader. Its goal was to review the major issues of resources, technology, and access which affect the users of all types of libraries.

Shaping the Future

"Change is the inevitable.
In a progressive country,
change is constant." Benjamin Disraeli

Just as past studies helped to shape and strengthen the system for providing library services in Pennsylvania, so should this new Comprehensive Plan assist in the evolutionary process.

Pennsylvania's varied libraries represent a rich resource which must not be allowed to depreciate because of neglect or unresponsiveness to change. Not only the recreational reader or the youngster seeking facts for a school theme must be served. Citizens, government, business, and academia are all in need of an up-to-date flow of information to function in an ever-more complex society. Libraries can and must continue to be the source of that information. To assure that they are, this new probing look at library functions was undertaken.

The study began and concluded in a difficult era for government; one in which fiscal pressures were forcing a new search for priorities, a redefinition of services and goals, a new thrust for economy and a renewed demand for excellence. The phenomenal growth of knowledge and information and the development of new technologies have created opportunities, frustrations and, above all, a need for flexibility.

School libraries must teach youngsters how to seek information using these new technological enhancements as well as through traditional means. Public libraries must increase their utilization of technology in order to cope with the growth and complexity of modern society as well as continue their vital role as a source of self education and edification for people of all ages. The college and university libraries face similar challenges: students and faculty need access to more and more information and resources which can be made rapidly and efficiently available through microcomputers, databases, and mainframes. Libraries serving business and industry are similarly affected.

These pressures show no sign of abating in the remainder of this decade, for which the Council was planning. Libraries will feel an even greater need for more efficiency through improved structure, cooperation and employment of technology.

It would be shortsighted and foolhardy, if not unthinkable, to allow libraries in Pennsylvania to continue to function in a manner adequate only for the past or to let change take place with no attempt at collaboration or direction. Charting a wise path for the Commonwealth to follow in assisting libraries in the coming years

demands the thoughtful deliberation and the give-and-take of debates by a broad crosssection of Pennsylvanians. It was to provide such a forum for discussion that would result in a road map for the future that Governor Dick Thornburgh charged the State Library with developing a Comprehensive Plan for Library Services in Pennsylvania. It was not a simple assignment.

A planning process was developed with the assistance of the Department of Education's Bureau of Planning, Research, Evaluation and Dissemination. This process called for a large Planning Council which would be divided into Issue Committees and a much smaller Steering Committee.

The Planning Council had broad-based representation, not only in the geographic sense, but from the viewpoints of three major interest groups -- various types of libraries, various governmental units and various segments of the public which both support and use library service. The range and caliber of the men and women chosen to serve on the Planning Council were impressive, as was the scope of the organizations, institutions and agencies they represented (see Appendix A). This wide divergence of views was essential to make the plan comprehensive, to improve access to all libraries for all residents of Pennsylvania.

Before the Planning Council met the State Library prepared a booklet entitled Background Documents. In it the Mission Statement spoke of the need to plan a course for our libraries "that will address the needs of all Pennsylvanians...the information rich as well as the information poor."

The Mission Statement also identified seven issues to be considered in the development of a plan:

-- the varying constituencies for library service in Pennsylvania, their changing needs and how a marketing approach might be used by libraries to meet these needs and increase utilization of services

-- the relative role and level of state and local funding in support of libraries, as well as a look at other financial resources

-- the organization and governance of public libraries, systems and districts and the resulting effect on services provided to residents of the Commonwealth

-- the relationships among the different types of libraries in the state and ways to strengthen cooperative efforts to increase accessibility for all citizens

-- the state's role in supporting the services of the various types of libraries

-- the various service responsibilities of the library within the State Library and how these relate to users and other libraries

-- the impact of technology on library services in the years ahead and how to cope with it

This, indeed, became the seven-pronged target for study and recommendation.

The Planning Council was divided into seven Issue Committees, and each Issue Committee dealt with one of these areas. To help orient committee members, State Library staff wrote background papers expanding the areas of concern.

With this information, and with the benefit of their varied and valuable expertise, the Planning Council met and agreed to a statement of library goals as the foundation on which the planning effort was to build.

According to the Planning Council, the overall goals of libraries in Pennsylvania are to assure appropriate:

A. Access to materials, information and programs to meet community needs, including the needs of special clientele.

B. Learning opportunities, as an integral part of formal education programs, as well as for individual lifelong learning activities.

To accomplish these goals, efforts are made to assure appropriate:

1. Planning for services and programs to meet the needs of users and potential users.

2. Provision of human and material resources to implement the programs and services.

3. Use of technology to initiate, expand and improve programs and services.

4. Public awareness of programs and services.

5. Funding for programs and services.

The Issue Committees worked on pinpointing the various problems associated with their issues. They gathered data to clarify the seriousness of the problems and document the need for change. They also looked closely at what caused the problems.

The Steering Committee's role throughout the process was to assign priorities to the Issue Committees, look for overlaps and omissions, and direct the solving of specific problems to the appropriate committees. Since the chair of each Issue Committee served on the Steering Committee along with representatives of the State Library and the various library organizations, this group was able to exercise considerable influence over the process and the outcome.

After the problem statements were agreed to by the whole Planning Council, the Issue Committees set about brainstorming solutions, or what came to be called Courses of Action. Complex issues and difficult problems led committee members to propose over 100 solutions.

The Steering Committee stepped in to develop some criteria which the Issue Committees could use to rank the many courses of action. Using these criteria, the Issue Committees were able to winnow the proposed courses down to about 70.

At this point, midway in the planning process, the Planning Council felt it was necessary to provide information to interested groups and individuals about their deliberations. The State Library prepared a document entitled Work in Progress that summarized planning efforts and listed the proposed courses of action with their implementation steps. The booklet was widely distributed to librarians and other pertinent groups.

At the same time, the State Library felt the need to get the reactions of a broad cross section of the public to the proposed courses of action. It sent out a questionnaire, designed by the Bureau of Planning, Research, Evaluation and Dissemination, to sample members of various organizations and interest groups represented on the Planning Council. The questionnaire asked respondents how important they felt various courses of action were in the solutions to problems. Out of 4,308 questionnaires mailed, 32% were returned. In analyzing the data, the Bureau of Planning, Research, Evaluation and Dissemination categorized responses into four groups: public, educators, public officials and librarians. The responses were positive -- all courses of action were rated important -- and showed a gratifying sense of involvement on the part of the respondents. Twenty-four percent of them added helpful narrative comments.

In addition to this field test of the ideas being proposed, State Library staff met with staff of the House and Senate Education Committees to review some of the proposed courses of action and to check on their political ramifications and feasibility.

The plan, at this stage, was far from complete. It was too big to implement. The complex process of choosing the most important and the most politically feasible courses of action began. The Steering Committee started by merging, revising and discarding courses of action until they were left with 26. The Issue Committees, taking into account the survey results and the political ramifications, followed a similar process.

At the final meeting of the Planning Council, members reached consensus on the 19 recommendations that became the basis of this plan. State Library staff expanded the recommended courses of action by adding information on the problem being addressed along with the intent and possible implementation activities for each course. At its last meeting, the Steering Committee revised and gave final endorsement to these expanded courses of action.

As the work of the Planning Council began to draw to a close, the State Library retained the firm of Packer, Previc, Oesterling and Smith to edit a plan written by many hands, and to help develop marketing strategies to ensure acceptance and implementation of the Planning Council's recommendations. Representatives of the firm attended all of the meetings from April through July 1983 to gain insight into recommendations.

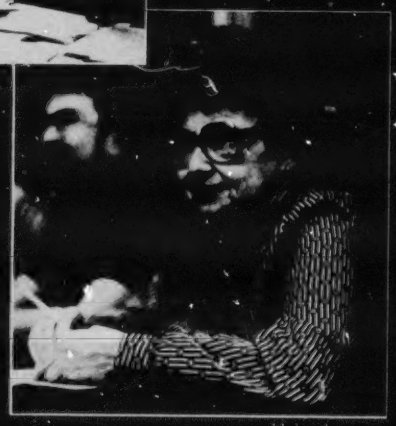
While the process used for development of the Comprehensive Plan was long and at times tedious, it was exciting to see so many lay individuals taking an active and interested look at library services in Pennsylvania and ways it might be improved. The resulting recommendations have the backing of the 95 member group. They will work to garner the support of the members of the organizations and groups they represented for implementation of the recommendations.

These recommendations are encompassed in the Comprehensive Plan contained in the report. Its action plans are a road map to a future of improved library service.

Now the roads have to be traveled.

Recommendations of the Planning Council for Improved Access to Library Resources in Pennsylvania

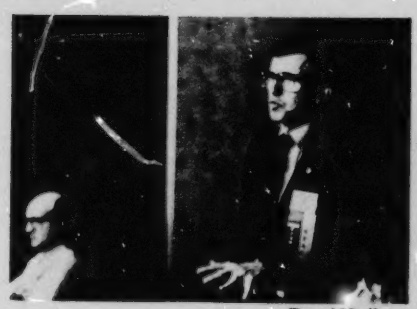
Doris Epler, Linda Cook, Doris Freeman



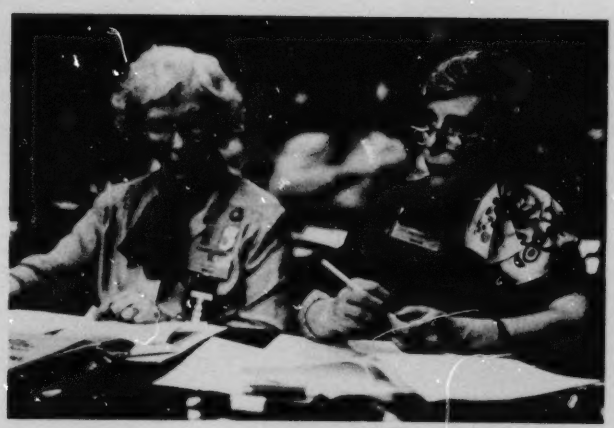
Helen Linzey

"The Comprehensive Plan is a step in the right direction for Pennsylvania libraries. I hope the legislature, the library community, and the public-at-large will use it to upgrade the quality of library service in our state. James C. Rettinmiller

Recommendations to Maintain and Enhance Quality of Service.



David Hoffman



Jule Shipman, Carolyn Milligan

I believe the implementation of the plan will provide improved library/media services to all the citizens of the Commonwealth, whether their needs are best served by public, private, educational or special libraries. The plan recognizes the need for adequate funding for libraries as well as the continuing need of user accessibility to library services which are sensitive to changing times.

Carolyne B. Milligan

SERVING LOCAL DECISION MAKERS IN EDUCATION, BUSINESS, LABOR AND GOVERNMENT

By serving the information needs of present and potential funding bodies, libraries can demonstrate the importance of their service. Libraries can contribute to the economic development of their community through service to local business and government.

A. Addressing the Problem

Decision makers in business, labor, and nonprofit organizations, and persons serving on funding bodies who do not use libraries either in their personal lives or to meet job related needs may have difficulty in understanding the significance of library service. Yet often they have critical information needs that go unmet. School and academic administrators and boards also need access to such materials as statistical data, government reports, educational studies and supervisory manuals to carry out their responsibilities effectively. Local government officials need access to similar materials to make informed decisions on housing, flood control, investments, and more.

Members of the local business community and industry need access to information in such areas as managerial skills, technological developments and state and local regulations. Their success supports the economic well-being of the community. The Planning Council, therefore, has recommended that:

> The State Library should encourage all types of libraries to develop and improve library and information services to their administrative and funding bodies and to their local business community.

B. Intent of the Course of Action

The intent of this course of action is to identify some of the specific information needs of key community groups and to then encourage and assist libraries to meet those needs. Cooperation and interaction are the keys to this effort. School libraries, for example, have collections primarily designed to meet curriculum needs. Yet they also should and can support the information needs of their administration through the shared use of databases and access to the collections of other types of libraries. Public, academic and special libraries will also need to draw on each other's collections to meet the broad based information needs of these groups. The results should be improved information services to various groups within a community, better utilization of the available resources, and a better understanding by these groups of the value of libraries.

C. Possible Implementation Activities

State support can be in several forms: (1) support of pilot projects, (2) assistance in contacting the groups to be served and

(3) dissemination of results. Specific activities include:

1. Service to school and academic decision makers

   a. Continue efforts to encourage library staff use of the resources available through the State Library's School Library Media Division: access to LIN-TEL (online bibliographic searching), curriculum guides, software reviews, and professional information.

   b. Continue and expand LIN-TEL to identify the specific information needs of education decision makers and to determine how best libraries can meet these needs. Encourage the adoption of the LIN-TEL network by other libraries. Analyze the findings of LIN-TEL and disseminate the results to state associations of school superintendents, school boards, curriculum coordinators, teachers, faculty and parents.

2. Service to local business, labor and government

   a. Work with existing units of state government, such as the Department of Community Affairs and the Small Business Action Center, to make them aware of the types of information libraries can provide in such areas as managerial skills, technological developments and state and local regulations.

   b. Work with state associations of local government units and business interests to make them more aware of library services available to their members and to identify their information needs.

   c. Develop a pilot project in targeted areas of the state to demonstrate how libraries can serve as information centers for local business, labor and government.

   d. Encourage academic, school and public libraries to serve as information centers for local business, labor and government.

   e. In communities where academic libraries are significantly stronger than public libraries, develop local consortia to take advantage of academic library resources and faculty expertise, and, together with public libraries and other agencies, to provide specialized information and research service to local government, labor and business groups.

PLANNING

All libraries must involve their communities in the preparation of a five year plan which addresses identified needs.

A. Addressing the Problem

Many libraries do not receive adequate funding from local sources to provide needed services. Not enough people, or perhaps not enough of the right people, understand the library's goals and the problems it must overcome to meet those goals. Perhaps not enough attention has been paid to identifying the needs of the people the library is to serve. There should be a systematic approach for providing service which emanates from these needs. Once services have been adjusted, they should be publicized, then evaluated. Furthermore, technology can offer the opportunity to provide needed service in new ways. The Planning Council, therefore, has recommended that:

> In order to be eligible to receive state grants, all libraries must involve their communities in the preparation of a five year plan. This plan should include a needs assessment which addresses technological services.

B. Intent of the Course of Action

This course of action would require all libraries to do systematic planning if they apply for funds handled by the State Library, whether it be state funds or federal funds. In some cases this planning has already been done. State Library regulations already require some libraries to submit plans and some school libraries are required to do so in their district long-range planning. This course of action would require a five year plan where such plans are not adequate or do not currently exist.

C. Possible Implementation Activities

1. Revise regulations for receipt of State Library grants (including federal funding sources) to require appropriate local plans. Guidelines for the process and its components should be developed.

2. The State Library should employ an additional resource person or provide additional staff to enable it to consult not only on the planning process, but on how to tap other funding sources.

3. Provide continuing education opportunities for staff of all types of libraries on the planning process and its intended outcomes.

4. Develop a public relations component to keep patrons, students, parents and decision makers informed of developments in library services which result from planning efforts with emphasis on the availability of new technologies.

CONTINUING LIBRARY EDUCATION

Design and coordinate the provision of continuing library education programs for library personnel and their governing bodies in such areas as marketing, technology and interlibrary cooperation.

A. Addressing the Problem

Librarians are finding that their knowledge and skills are rapidly becoming obsolete when facing the challenge resulting from new technological advancements. A number of people are not using libraries -- perhaps because libraries have not included marketing concepts in their development of service to the community. Too many trustees of public libraries are not aware of all of their responsibilities in the governance of the library. Many school librarians need assistance in developing effective institutional objectives. Access to information held by libraries is frequently limited because the library staff lacks understanding or experience in cooperation or resource sharing. These issues indicate a need for continuing education to enhance the practitioner's skills in the areas of technology, marketing and interlibrary cooperation. The Planning Council, therefore, has recommended that:

> The State Library should participate in the design, coordination and provision of library related continuing education opportunities within the state. Emphasis of programs should be on the needs of library personnel, administrative bodies and library users. Content should focus on marketing, interlibrary cooperation, technology and governance responsibilities.

B. Intent of the Course of Action

In an ever-changing, highly competitive society, continuing education is a key to the future of library service. The various areas of continuing education are pulled together in this course of action so that design, coordination and provision can be more effective. This course of action proposes that the State Library continue to promote and coordinate continuing education activities statewide. Emphasis needs to be placed on assisting present library staff and their governing bodies to utilize marketing and technology concepts, and to participate in interlibrary cooperation activities.

C. Possible Implementation Activities

1. Utilize the continuing education advisory committee as a vehicle to design, promote and coordinate statewide continuing education activities.

2. Continue to provide continuing library education to librarians and their governing bodies in Pennsylvania.

CONTINUING LIBRARY EDUCATION

3. Work with library educators, intermediate units, district library centers and other continuing education providers to encourage the provision of programs which meet the needs of libraries in Pennsylvania.

EFFECTIVENESS OF STANDARDS

Institute studies to determine how effective state standards have been in assuring quality library service and make appropriate changes.

A. Addressing the Problem

For most types of libraries there are standards that have been developed by government, accreditation bodies or trade associations. Some of these standards are goals toward which libraries or institutions with libraries should strive. Others are minimums beneath which no library should fall. Some standards are recommendations with no teeth. Others are requirements to which funding is tied. Most of these are input based or describe what needs to be put into libraries such as: number of books and other materials, training of staff, and size of facility. Little data exists which supports the fact that these standards guarantee or enhance the quality of library service.

A new focus suggests including standards based on output or performance measures such as: how much of the population is served (percentage); how often can the item requested be supplied; and how often can the question asked be answered. The Planning Council, therefore, has recommended that:

> The State Library should institute studies to determine how effective state standards have been in assuring quality library service and, where appropriate, develop or revise standards to assure quality library service.

B. Intent of the Course of Action

The intent of this course of action is to study the impact of standards or regulations on quality library service. Do standards help improve service? Should standards be minimums or ideals? Are there any standards that are more effective than others, i.e., staff vs. materials? Are performance standards any more effective than input standards?

C. Possible Implementation Activities

1. Perform a study of the relationships between standards and quality library service, analyze the results and make recommendations to revise current state regulations and other standards or, where appropriate, develop standards where none now exist.

2. Disseminate the findings of this study to those involved in all types of libraries, to public, school and academic decision makers, and legislators. These results should be available in hard copy and also placed in databases such as the Pennsylvania Educational Resource File (PERF), the Educational Resources Information Center (ERIC) and the School Practices Information File (SPIF).

GREATER INCENTIVES TO COUNTIES

Greater incentives should be provided for counties to assume responsibility for public library services.

A. Addressing the Problem

Pennsylvania public libraries derive their local public funding from many sources -- boroughs, cities, townships, counties and school districts -- none of these, however, is required to provide such funding. This has resulted in uneven growth, development and government support for public libraries in Pennsylvania. Since counties with their contiguous borders are the only level of government which cover the entire state and encompass every other level of government, the Planning Council, therefore, has recommended that:

> Greater incentives should be provided for counties to assume responsibility for public library services, including services to the unserved.

B. Intent of the Course of Action

The intent of this course of action is to provide free access to a public library for every Pennsylvania resident and to provide more consistent and uniform support for public libraries within a geographic area.

Municipal funding sources vary from library to library and many are overlapping. A public library may receive funds from a borough, a township and the school district that encompasses it. Another library in an adjacent borough, but in the same school district, may only receive funds from the borough. The result is that residents of the school district outside the borough may not use the library without additional charge.

In a mobile society such as ours there should be a way to provide access to resources within a geographic area. The structure for providing this access between libraries most logically is county government.

Finding ways to encourage counties to take on this responsibility leads to this course of action.

C. Possible Implementation Activities

1. Develop an educational program aimed at county government and its officials designed to motivate support for public libraries.

2. Provide more state aid money for county systems, specifically to revise the percentage aid formula.

GREATER INCENTIVES TO COUNTIES

3. Recognize counties that do support quality public library programs. Request that the Pennsylvania Library Association and the Pennsylvania Citizens for Better Libraries present annual awards at their own and the county commissioners' conferences. At the local level, Friends groups and library boards would be encouraged to publicly recognize their county governments for their support. The State Library could sponsor a Commissioners' Day.

STRENGTHEN SERVICE TO STATE GOVERNMENT

The library which is part of the State Library should give priority to service to state government, but continue to serve other libraries, and to the extent its budget permits, make its resources directly available to individuals.

A. Addressing the Problem

Expectations differ as to the purpose and function of the library which is part of the State Library (properly, the Library Services Division of the Department of Education's Bureau of State Library). As the largest and most comprehensive library in south central Pennsylvania, it is seen by individuals as a library to serve state government, a library to be used by students (high school, college, graduate), a library for the state's legal community, for historians, for genealogists, members of the professions, and as a library for the general public. It has responsibilities as a resource for other libraries, for inter-library loan and photocopy service. Neither budget and personnel nor its collection are sufficient in size to enable the library to provide all of the services which are desired by the several possible client groups. The Planning Council, therefore, has recommended that:

> The library which is part of the State Library should establish as its primary focus the provision of services and resources required to support information and research needs of state government. It should, however, continue to make its collection and service as generally accessible as circumstances permit, giving particular attention to its responsibilities to support other libraries by improving access to the collection and services.

B. Intent of the Course of Action

The library should focus its services and resources to meet state agencies' information needs. It should review for appropriateness the service it provides to individuals outside state government, taking into consideration the uniqueness of parts of the collection and services, and the availability of similar or corresponding services from other libraries in the area and the state. As a Regional Library Resource Center it should provide appropriate collections and access means for other libraries. As a regional depository for U.S. Government publications it should provide support services to other depositories and other libraries generally, and as the agency responsible for distribution of state documents to depository libraries it should continue its efforts to obtain and distribute all appropriate Commonwealth publications.

C. Possible Implementation Activities

1. The library should have an ongoing program to assess the information needs of state agencies. Conferences with individuals, surveys, a study of the research agendas of agencies and similar methods may all be appropriate.

2. Materials selection strategies must be carefully attuned so that the Library acquires a high percentage of the materials needed by state agency personnel in the course of their research.

3. Special services, including computer search programs, must be adapted to assist state agency personnel.

4. The Library should establish and/or maintain links with other state agency libraries and with research units in state agencies in order to improve access to its collection and to information collected and maintained by state government generally.

5. Information should be provided to state agencies and to other libraries about the State Library's collection; COM (Computer Output Microfische) catalogs and on-line access should be used where feasible.

6. The library should continue to maintain special strength in subjects for which it has a statewide responsibility as a resource library. It should continue to provide access to these materials via other libraries and to those individuals who visit the Library in person.

7. As a federal documents depository the library which is part of the State Library should promote general awareness of the resources available in depository libraries and from federal documents generally.

Recommendations for the Provision of Materials and Resources.

Kathryn Stephanoff, Judith M. Foust

Kris Subramanyam

The implementation of this plan will open up new channels for dissemination of vital information to all sectors of society for the overall development of the state. Kris Subramanyam, Ph.D.

STATEWIDE ACCESSIBILITY

The State Library should develop some means of enabling those who need it to have access to the rich and varied holdings of Pennsylvania's many libraries without restrictions based on political boundary or institutional affiliation.

A. Addressing the Problem

Most libraries get their primary support from municipalities such as boroughs, townships and counties; or educational institutions such as school districts, colleges and universities; the private sector; or residential institutions such as prisons and hospitals. There is an understandable resistance when individuals of one educational institution begin to rely heavily on the library of another institution or public library. The resistance is even more understandable when the library is part of a corporation or other private enterprise.

Since our population has become increasingly mobile, it is not unusual for an individual to live in one municipality, work in another, attend classes in a third, and shop in a fourth. It seems less and less reasonable to deny people access to the resources of a library because they do not live on the proper side of a municipal boundary. Furthermore, the costs would be prohibitive if each library tried to own all materials on all subjects to satisfy its users. Sharing and borrowing among libraries is sensible and should occur even more than it now does. The Planning Council, therefore, has recommended that:

> The State Library should develop some means for providing statewide accessibility to all types of libraries.

B. Intent of the Course of Action

This course of action is intended to address both ways of achieving greater sharing of resources among all types of libraries and ways to allow patrons to directly borrow materials from any library resource in the Commonwealth.

C. Possible Implementation Activities

1. Develop and implement a comprehensive program of accessibility to the resources of all types of libraries utilizing the following components:

   a. Assess needs of patrons and students, both in terms of subject areas and locations of library resources.

   b. Involve libraries of all types in an assessment of the barriers to sharing of resources, especially direct borrowing by persons who are not their primary patrons.

c. Survey other states with statewide borrowing mechanisms.

d. Develop a mechanism for implementing a statewide borrowing plan which includes recoverability of materials or their replacement cost.

e. Encourage continuing development of bibliographic databases used in common by Pennsylvania libraries, by selectively supporting the creation of bibliographic and holdings records for materials not generally held in most communities.

f. Increase promotion of the availability of interlibrary loan through all libraries.

2. Encourage libraries of various types within a geographic area to develop a comprehensive plan for sharing library resources.

LOCAL FINANCIAL SUPPORT

Libraries should become more aware of the various sources of private, corporation and public monies and techniques for securing these funds.

A. Addressing the Problem

Many libraries are in need of increased local financial support in order to offer varied and improved services to their communities. Frequently, libraries are unaware of the alternatives or additional funding programs sponsored by government agencies or foundations and associations for which they can apply.

An understanding of the budget and the legislative process as well as the intention and philosophy of the grant programs offered by foundations and industries is an important factor which should be incorporated into a library's appeal for funding. Libraries need to know how to communicate appropriately with such potential revenue sources as corporations, foundations and governmental units. They also need to understand the timing and complexities of the budgeting and fund raising process of potential contributors. The Planning Council, therefore, has recommended that:

> The State Library should implement a program which examines the availability of tax and non-tax revenues at both the state and local levels and recommends ways of securing these funds.

B. Intent of the Course of Action

The overall intent of this course of action is to help libraries become aware of existing tax and non-tax revenue potentials within each class of government, and of sources of private funding from individuals, foundations, business and industry.

Where there are government funds available which do not now include libraries as common recipients of grants, efforts should be made to include libraries wherever possible.

A financial development advisor with expertise in various funding sources could assist librarians from public, school and college libraries to develop fund raising campaigns and to seek legislation to make contributions to libraries more attractive to business and industry. Through this assistance, libraries could become sensitive to approaches which could appropriately be utilized in requesting support from citizens, business and industry. This office could also assist in ongoing attempts to keep community and funding bodies aware of library programs, resources and services.

C. Possible Implementation Activities

1. The State Library will provide, through the State Library, staff support to work with libraries through the District Library Centers, Intermediate Units and existing cooperative groups to help increase funding sources.

2. Establish relationships with the Pennsylvania Chamber of Commerce and other similar organizations to identify their information needs and any possible funding for programs to meet these needs. Once determined, the State Library should work with libraries to develop such programs.

3. Work closely with the Department of Community Affairs to better understand existing programs.

4. Sponsor workshops on how to raise funds in the private and corporate sector.

EXEMPLARY MODELS OF INTERLIBRARY COOPERATION

Identify and share information about successful interlibrary cooperative programs.

A. Addressing the Problem

No library can or should function in total independence from other libraries. Over the years cooperative relationships among libraries have developed for many reasons, some of which include: to lend the materials owned by one library to the clients of another library through direct loan or interlibrary loan; to share training experiences; to agree to purchase materials in different subject areas so as not to unnecessarily duplicate; to develop a combined list of holdings so that users of one library can determine what is available in another library; to share the costs of cataloging or purchasing; to share costly equipment or to share ideas. There are always costs associated with cooperation whether in the time and energy of staff or in more tangible direct costs. Despite these costs, libraries enter into cooperative arrangements because it enables them to provide better service or to provide the same service for less.

There are now more reasons why libraries must pursue cooperative ventures than ever before. The world of knowledge and information is expanding so rapidly that each library can purchase only a decreasing percentage of what is produced, and can preserve a smaller percentage of what it has purchased previously. Technological advances are making cooperative activities possible that were too costly before and also are establishing higher expectations based on the library's ability to provide service. In short, it is essential that all those concerned with libraries and information look for ways to accomplish more with less through cooperation. The Planning Council, therefore, has recommended that:

> The State Library identify and share information throughout the state on those cooperative interlibrary programs which are currently operating and/or which could be put in place, and which are economically or otherwise beneficial to their members.

B. Intent of the Course of Action

In order to assist in the development and expansion of cooperative activities, the State Library should identify the most significant examples of cooperative programs that work well for the participating libraries. Effective methods for replicating these programs through adoption or adaptation by other libraries should be developed. These programs may be among libraries of one type or a variety of types of libraries. They may be in one or more local areas or they may be throughout the state.

C. Possible Implementation Activities

1. The Pennsylvania Council of Library Networks (expanded to include school library groups and library educators) will assist the State Library in determining the criteria as well as conducting the search and choosing the models.

2. A search will be conducted to find successful models on the local, state and national levels.

3. The list of successful cooperative models would be made available to libraries of all types in a printed format as well as on-line through the Pennsylvania Educational Resource File (PERF).

4. An appropriation would be requested from the State Legislature under existing Library Code authorization to provide financial assistance to encourage school. academic, public and other types of libraries to participate in interlibrary cooperative activities (such as the Pennsylvania Union List of Serials (PaULS)).

TECHNOLOGICAL COMPATIBILITY

The State Library should take a leadership role in conjunction with the networks and other agencies to encourage technological compatibility.

A. Addressing the Problem

Libraries are establishing computerized information systems that utilize different types of hardware equipment and software programs. Some use their own computer or one belonging to the institution of which they are a part. Others are using commercially available turnkey systems. These systems may not have the capability to communicate with each other and this creates a barrier to cooperative sharing of resource materials by these libraries. Similar barriers exist wherever libraries use different formats, such as video. This is becoming even more of a problem with the advances in microcomputers and the reductions in cost which will permit many more libraries to purchase their own equipment and the accompanying software. The problem is partially industry related and it is up to the manufacturers and the marketplace to seek the solution. However, it can also be overcome by ongoing efforts by the State Library to encourage the use of national standards and informed purchasing of equipment by libraries. For example, if the systems mentioned above have their records in the libraries-formulated national cataloging standard of MARC format, then building an interface between them may be neither expensive nor difficult. Care needs to be taken that a particular standard being promoted does not lock libraries into an obsolete format. Educators and librarians are especially sensitive to this problem. The Planning Council, therefore, has recommended that:

> The State Library should take a leadership role in conjunction with the networks and other agencies to encourage technological compatibility.

B. Intent of the Course of Action

The State Library's activity in carrying out this course of action should be double-pronged. On the one hand, it should provide input into the national standards development process, so that manufacturers, government agencies, and others can have a better understanding of the needs of the library market. On the other hand, it should assist librarians in understanding the role of standards for equipment, hardware, and software, so that they have a better understanding of the limitations as well as of the capabilities of the equipment and systems they select for use in their libraries. The State Library should, for example, help librarians to understand ways that cataloging and circulation systems which use national standard bibliographic records may be interfaced to assist in sharing of resources, whereas, systems

which do not share standard formats offer little likelihood of easy communication links.

C. Possible Implementation Activities

1. Encourage libraries to be aware of national standards and to use them in writing specifications for equipment, retrospective conversion, etc.
2. Require adherence to national standards for any project supported with state or federal funds.
3. Encourage libraries to be prepared for the systematic replacement of equipment and software as technology advances.
4. Establish ways, including links with networks and library association groups, to support the development of appropriate standards for library technological growth.
5. Continue to provide software workshops for school librarians and curriculum supervisors.
6. Develop and distribute information explaining various types of hardware and software which includes new technologies.

PERMIT MUNICIPAL SUPPORT ABOVE THREE MILLS

The Library Code should be amended to permit municipalities to appropriate more than three mills to the support of the local library.

A. Addressing the Problem

Many public libraries have not had sufficient local municipal funds to carry out their intended service and programs. The current law prohibits any municipality from appropriating more than three mills for the support of a library. This is true regardless of whether the money comes from general revenue or a special tax. While many municipalities are not very close to this limit in their appropriations, others have already reached it. In some cases the problem exists because property assessments have not kept pace with inflation. In any case, a municipality should be permitted to support the local library at a level as high as it chooses. The Planning Council, therefore, has recommended that:

> Legislation should be drafted to allow the municipalities to increase their support to public libraries beyond the current three mill ceiling.

B. Intent of the Course of Action

The intent of this course of action is to amend the current law to remove the three mill limit. This will enable those municipalities already at the millage limit to offer a greater degree of financial support to public libraries. It will also provide increased potential for those libraries in areas where the assessed valuation of taxable property remains low. In addition, the proposed legislation should call attention to the fact that libraries urgently need more governmental financial support, and that municipalities can and should provide increased appropriations.

C. Possible Implementation Activities

1. The State Library should secure statistics on the number of libraries affected by a three mill ceiling and the impact on their services through the review of the State Aid Program being recommended under another course of action, Revise the State Aid Program. A review of this information will result in a recommendation that either a higher ceiling be set or that the ceiling be lifted entirely.

2. Based on these statistics and other information, the State Librarian should see that the necessary legislation is drafted and reviewed by the Governor's Advisory Council on Library Development.

PERMIT MUNICIPAL SUPPORT ABOVE THREE MILLS

3. Support for the legislation should be sought from within the library community, interested public, municipalities and legislators.

REVISE STATE AID PROGRAM

The State Aid Program for public libraries should be simplified and modernized to reflect economic changes in Pennsylvania.

A. Addressing the Problem

Pennsylvania libraries derive their operating income from many sources: municipalities, school districts, the state, the federal government and the private sector. Frequently, all of these sources together do not provide enough money to support the library services needed by the public.

The current state aid program enacted in 1961, amended in 1972 and 1980, is an incentive program to encourage local municipalities to adequately support their library. In theory, the more money the local government appropriates to the library the more state aid the library will receive, thus providing the library with sufficient operating money from the combined sources. This goal has seldom been achieved. Pennsylvania ranks 9th in the nation in state aid per capita, and 40th in the nation in local appropriations.

The incentive factors for state aid were based on the market value of real estate in the 1950's when the aid program was developed. Since then, inflation has nearly tripled market value, but the per capita funding requirements necessary to receive the aid have remained static. For example, there is an equalization category which was designed to assist communities less able to support public library service. Equalization aid goes into effect when one-half mill times the market value of real estate in a municipality supporting a library is lower than $1.25 per capita. In the mid-1960's, approximately 68% of the public libraries received equalization aid. By 1982, the percentage had dropped to 4%. Another example is illustrated by the local expenditure necessary to qualify for aid. The minimum required local effort is still $2.00 per capita, and, it only takes $2.50 per capita spent locally to gain what is virtually the maximum of $.55 in state aid. If these per capita values were valid in 1958 when The Library Code was being developed, inflation would have nearly tripled their value today. The Planning Council, therefore, has recommended that:

> The state aid program for public libraries should be simplified and modernized to reflect economic changes in Pennsylvania.

B. Intent of the Course of Action

The intent of this course of action is to develop a more effective state aid program with fair and equal funding patterns. The new aid program must have the means to attract new local money for libraries as well as increase the base level of state aid.

C. Possible Implementation Activities

1. The State Library should designate someone to:

   a. Review the various categories of state aid and their resulting impact on libraries.

   b. Research other state subsidy programs in Pennsylvania and other states.

   c. Prepare models for projecting the impact of modernized per capita values on various libraries.

   d. Review various studies being made of systems and Regional Library Resource Centers to see the implications they have for a revised state aid program.

   e. Prepare a plan for changing The Library Code to simplify and modernize the state aid program so it will be economical and equitable and assure that no library will receive less than it receives under the current program.

2. The State Librarian will then:

   a. Review the report and submit recommendations for the new program to the Governor's Advisory Council on Library Development.

   b. Obtain reactions from the library community, interested members of the public and the legislature.

   c. Draft and work for passage of necessary legislation to implement the new program assuring that the present appropriation levels are not jeopardized.

Recommendations for the Promotion of Good Management Practices.

Sister M. Constance Melvin, I.H.M.

Keith Doms, James H. McCormick

This planning effort was targeted on providing the best possible service for the people of Pennsylvania and that is what I want for my neighbors.

Sister M. Constance Melvin, I.H.M.

A MARKETING APPROACH TO LIBRARY SERVICE

Libraries should be encouraged to adapt the approach to products and services used in the business world.

A. Addressing the Problem

Historically library service has been based on the premise that libraries provide materials which people want and will use. Yet we all have neighbors who never think of checking at the public library for materials on preparing for a job interview, information on home computers or other current interests. There are students who graduate from college who have made minimal use of the college library. Likewise, there are school students who turn to their family's outdated set of encyclopedias to write a report when a variety of materials may be available at the school library. Why don't these people use their libraries? It may be that the library does not have a collection or provide services responsive to current needs. The library's services may not be easily accessible or inviting in a world where many have grown up with Sesame Street, soft drink commercials and the signage and displays that stores use to assist/entice the customer. Or, potential users may just not be aware of available services. The Planning Council, therefore, has recommended that:

> The State Library will encourage the use of marketing by all types of libraries to increase utilization of library services and, as part of this responsibility, encourage education in marketing for library policy makers, staff and support groups. Marketing shall be defined as an analysis of community needs, identification of resources, review of products and services to meet these community needs, and promotion and advertising efforts to increase awareness.

B. Intent of the Course of Action

In the 1970's nonprofit agencies began to successfully adapt business marketing techniques to better serve their clientele. In the forefront have been agencies such as the United Way, hospitals, museums and formal education institutions. The intent of this course of action is to encourage librarians to also use a more systematic marketing approach: to identify the needs/wants of their particular library's constituency, to make some tough decisions about what the library's priorities should be, given the available resources, to deliver the decided upon services effectively and to make potential users aware of the available services. A key component of this course of action has to be training for library policy makers, staff and support groups because, until recent years, marketing has not been a part of the library school curriculum, nor has it been utilized to any great extent in a library environment.

C. Possible Implementation Activities

1. Continue efforts to integrate library instruction within the schools, with emphasis on supporting curriculum goals. Specific activities might include:

   a. Contacts with school superintendents by State Library staff to demonstrate the value of the participation of school librarians on local curriculum committees.

   b. Development of a model program which demonstrates how library skill instruction teaches students to think analytically. The model can then be shared with school superintendents, librarians, teachers and administrators.

   c. Support academic librarians in their efforts to have a formal bibliographic instruction component added to the academic curriculum and take a leadership role in demonstrating to academic faculty and administration the importance of developing their skills at all levels to support lifelong learning.

2. Continue efforts to encourage public librarians to measure the effectiveness of services using such means as the output measures developed by the Public Library Association of the American Library Association. Assist school, academic and special librarians to modify these measures for use within their environment.

3. Incorporate marketing concepts in State Library sponsored or funded continuing education activities.

   a. Appointment of small committees, each representative of a particular type of library, to identify specific training needed for staff of their type of library.

   b. Offer workshops to all types of libraries designed to meet these needs, or include marketing concepts in other workshops to demonstrate the relevance of marketing to a particular subject area or activity.

4. Incorporate the use of measures of effectiveness in the various components of local projects federally funded through the State Library.

5. Use federal funds administered by the State Library to encourage and support library use of marketing concepts.

FINANCIAL INCENTIVES FOR RESOURCE SHARING

There should be financial incentives to encourage and assist libraries to share their collections with other libraries. This might include paying money to each library that lends more to other libraries than it borrows.

A. Addressing the Problem

Everyone needs access to more and more information which is available in libraries. Students need information to complete curriculum requirements. Professionals must keep abreast of their own fields of expertise as well as related disciplines. Workers often need information to retrain themselves for new job skills. We need information from survival level to astrophysics. No one library, be it in a school, college or university, law firm or the public library, has all of the materials needed to meet the needs of every individual using its facilities.

A needed book or magazine not available in one library may well be available in another; but, it may not be available for borrowing by the person who needs it. In order for libraries to share the materials in their collections, they must first have some mechanism for knowing if another library owns the item being sought. There must also be a willingness on the part of one library to request the material from other libraries. Then, of course, the other library must be willing to lend it.

One reason libraries hesitate to borrow and lend with other libraries is the cost. The Planning Council, therefore, has recommended that:

> Continuing financial incentives be provided, including reimbursing net lenders, to encourage greater resource sharing among all types of libraries.

B. Intent of the Course of Action

The intent of this course of action is to compensate those libraries which are sharing the materials in their collection with other libraries. One possible method is to reimburse the library which lends more materials to others than it borrows. This compensation may make it more attractive to libraries with special collections, college and university libraries, and other types of libraries to lend their materials to others.

C. Possible Implementation Activities

1. Identify libraries which are net lenders.

2. Determine cost of lending and borrowing materials from other libraries.

3. Establish a formula for compensating libraries which lend materials to other libraries.

4. Fund various pilot projects of reimbursement procedures, i.e., net lender, reimbursement for lending, and others using LSCA (Library Services and Construction Act) monies.

5. Request an appropriation from the Legislature under the existing Library Code.

6. Seek an appropriation to subsidize the statewide interlibrary delivery service (IDS) in order to transport materials that libraries lend to one another as quickly and economically as possible. Intermediate Unit and District Library Center local delivery systems will be utilized as possible connecting points.

7. Continue to utilize LSCA Title III funds to encourage resource sharing including greater involvement of Intermediate Units.

INCREASE LIBRARIES' USE OF APPROPRIATE TECHNOLOGY

Assist libraries to re-examine their missions and budgets in light of newer technology.

A. Addressing the Problem

Libraries need to be more actively involved with the new information technology. They should investigate providing such services as online reference database searches, computerized online catalogs of library holdings, user access to microcomputers or loaning of videocassettes. If libraries do not adapt to the new technologies, many of which deliver information directly to the home or work place (such as home computers and video), they stand the chance of being bypassed. Their valuable resources would become irrelevant to their various communities. Libraries in general need to modify services in line with their communities' needs for information. The Planning Council, therefore, has recommended that:

> The State Library assist libraries to re-examine their missions and budgets in light of new technology and its impact on libraries as information resources as well as sources for entertainment, culture and education.

B. Intent of the Course of Action

This course of action addresses ways in which the State Library can encourage a change in attitude by more tradition-minded library decision makers. It is hoped that a changed attitude will lead to a reallocation of existing resources so that new technology can be incorporated into the libraries' services.

Technology should be defined as including more than computers, or what is known as "information science." Libraries should provide information in many different media formats, paying attention specifically to newer video technologies such as videocassettes or videodiscs. Information, entertainment, culture and education all must be considered in this re-examination.

C. Possible Implementation Activities

Establish a statewide group with representatives from all types of libraries and their governing bodies to:

1. Select a resource model such as long-range planning for schools.

2. Define a procedural framework within which mission statements can be developed or re-examined by all types of libraries.

3. Market the need for such a re-evaluation.

INCREASE LIBRARIES' USE OF APPROPRIATE TECHNOLOGY

a. Develop a kit to outline the reasons and procedures for development and re-examination of mission statements in light of technological advances, including examples of libraries of all types where technology is being used successfully.

b. Offer regional workshops by professional organizations in conjunction with the statewide group.

c. Make participation in this process a prerequisite for eligibility for certain kinds of funding.

DEMONSTRATING ACCOUNTABILITY

Libraries of all types need to demonstrate the relationships between funds received and services provided.

A. Addressing the Problem

Library constituencies and funding bodies have not always been convinced of the value and usefulness of libraries. Until recently libraries have tended to justify the need for continued funding on the basis of meeting standards developed by professional associations or state requirements. Libraries asked for funds to provide ten books per student, to have a certain number of seats, to have a certain number of audiovisual materials, etc. Such justifications are no longer adequate. School and college administrators, public funding bodies and corporate boards need to know the potential impact of proposed expenditures, in order to make informed decisions. The Planning Council, therefore, has recommended that:

> The State Library will assist libraries of all types to demonstrate the relationship between funds received and services provided.

B. Intent of the Course of Action

The intent of this course of action is to provide assistance to libraries in demonstrating the relationship between funds received and services provided. If libraries can identify those relationships they will better understand their own services and will have data to justify their need for money. Once the data is available libraries must then be able to effectively present this information to their constituencies and funding bodies. Information must be presented to groups within a public library's community; to curriculum committees, teachers, parents and student groups in the case of school libraries; and to faculty committees, student groups and alumni of academic institutions. Information must be presented to those who hold the key to funding -- municipal officials, school administrators and boards, college administrators, corporate boards, etc. The result of these efforts should be that libraries will obtain their fair share of the available resources.

C. Possible Implementation Activities

1. Contract with an agency or agencies to work with the libraries of a school district, a public library or system, an academic library, and a special library to identify or develop demonstration models which can be adapted by other libraries. The agency and the cooperating libraries' efforts should include identification of the relationship between services and funding for each type of library and the

development of sample presentation materials which effectively utilize that data (perhaps data in graphic form, visuals, slides, etc.). The State Library will assist other libraries in adapting the models to their own circumstances.

2. The State Library will utilize the results of these models to modify its own data gathering instruments.

3. Concurrently, the State Library should encourage libraries to provide strong collections and to measure their services by concentrating on the products of their activities such as circulation and contacts with their clientele. Planning should be undertaken which could include identifying missions and priorities, as well as targeting services and statistics which should be improved.

RESTRUCTURE THE PUBLIC LIBRARY SYSTEM

Restructure the Pennsylvania public library system to encourage county system development, define the responsibilities of systems, districts and regional resource centers and tie state aid to services provided.

A. Addressing the Problem

Relationships and responsibilities among the levels of public library service in Pennsylvania sometimes overlap. The Library Code established local libraries, district library centers, and specifically named four regional resource centers. However, the concept of systems is not included in the Library Code. Pennsylvania systems have developed outside of the structure designed by the law. In some counties in the state there is a district library center that is also part of a library system but may or may not be the headquarters of that system. In addition, there may be independent local libraries in the county which are not part of the system, but are part of the district. This leads to confusion about roles and responsibilities. The Planning Council, therefore, has recommended that:

> The Pennsylvania public library system be restructured to: a) encourage independent public libraries and township library systems to join county library systems; and b) define the responsibilities of systems, system member libraries, the District Library Centers, the Regional Library Resource Centers and the Division of Library Development.

B. Intent of the Course of Action

The intent of the course of action is to encourage all local public libraries, including the two existing township systems, to become members of county systems. The Planning Council defined rather specific responsibilities for each of the four levels -- local, system, district and regional resource centers. Specifically, local libraries and township systems should:

1. offer the most frequently requested materials and services wanted by their communities; and

2. serve as a point of access for less frequently requested materials and services.

County library systems should:

1. assist local libraries in accessing municipal funding;

2. apply for and disburse state aid to system members;

3. establish and promote a standard of quality for local library services;

4. organize delivery and interlibrary loan to local libraries;

5. organize a public relations program for local libraries;

6. stimulate local service to unserved local populations; and

7. assist local libraries to measure performance.

District Library Centers should:

1. offer a resource collection for interlibrary loan and backup reference service for libraries in the district and make this collection available for use in the library by all residents of the district;

2. provide consultant service to libraries in the district;

3. plan participatively and report on the provision and cost of district service;

4. provide reference and information services to district libraries and residents;

5. serve as the liaison between local libraries and county systems with the State Library;

6. organize interlibrary lending program and delivery service to county systems; and

7. promote the use of technology among district libraries.

Regional Resource Centers should:

1. offer in-house use of their collections to Pennsylvania residents; and

2. provide interlibrary loan to district centers.

In addition, all libraries should be accountable for their expenditures and should be compensated by the state on the basis of services rendered. Leadership at the system and district levels, especially, is critical and the State Library should develop financial and administrative "incentives" which would assure this. It is also recommended that no county be in more than one district.

C. Possible Implementation Activities

1. Conduct a study of Pennsylvania public library systems to determine the impact systems have had on libraries' abilities to provide improved service, and make recommendations for future development of systems in Pennsylvania.

2. Provide continuing education for county system staff and boards to enhance their ability to fulfill their functions.

3. Establish and promote existing measures for local libraries, systems and districts to evaluate their performance.

4. Identify specific items which may be paid for with:

a. district aid -- items should be tied to district activities/functions only;

b. system aid -- although system aid would first have to be defined;

c. Regional Resource Center aid -- to be done in conjunction with review of Regional Resource Center responsibility recommended in another course of action, Review Regional Resource Center Program.

5. Revise the reporting mechanisms of libraries to make the annual report an improved tool to evaluate use of funds and services provided.

REVIEW REGIONAL RESOURCE CENTER PROGRAM

The State Library should initiate a review of the Regional Library Resource Center program to determine needs and modify programs if appropriate.

A. Addressing the Problem

The Regional Library Resource Center program was proposed in 1957 and enacted into law in 1961. This program is to provide for a group of super libraries to backstop district library centers and local public libraries through development of in-depth collections and provision of access to those collections for on-site and remote use. The four libraries in the program agreed to accept responsibility for collection development in specific subjects, and agreed upon an interlibrary loan code for their loans to the public library network. For a variety of reasons, libraries' requests for loans from these libraries frequently do not correspond to the subject collection assignments; and, in fact, the regional libraries' combined share of the total loans being made to public libraries in Pennsylvania is declining. The costs of providing service and the funds actually appropriated for the service are not closely related. The Planning Council, therefore, has recommended that:

> The State Library, the board of the Regional Library Resource Centers, and representative users should re-evaluate the Regional Library Resource Center program including collection development, and interlibrary loan reimbursement, and develop appropriate action programs.

B. Intent of the Course of Action

In the years since the program was established, a number of factors have had their effect on the role of the Regional Library Resource Centers. Such factors include the improvement of collections in public and academic libraries generally, changes in patterns of communication and delivery, improvement in access to information about the collections of other libraries, and changes in interlibrary loan philosophy. Therefore, the role of the Regional Library Resource Centers should be redefined and the services which should continue should receive greater attention and promotion.

C. Possible Implementation Activities

1. The Board should review data already available on use being made of the Regional Library Resource Centers, and determine the extent to which additional information is needed to support its development of an action plan. If additional information is required, the Board should specify and collect that information.

2. With the assistance of representative users (representatives of various libraries) the Board should determine which services are appropriately provided, to which libraries and through which channels they are to be offered, and whether additional libraries would be added to their number. If the Board determines that the number of resource libraries should be expanded, or if it concludes that the funding of resource center services should differ from the present pattern, it will be necessary to seek legislation amending the Library Code.

3. As the Regional Library Resource Center program is being examined, the State Library should concurrently examine other recommendations of the Planning Council which relate to interlibrary loan reimbursement and the improvement of access for users to libraries of all types. Recommendations titled Financial Incentives for Resource Sharing and Exemplary Models for Interlibrary Cooperation from the Planning Council are sufficiently related to this Recommendation that a common solution to the three may be preferable to separate consideration of each. That part of Recommendation titled Restructure the Public Library System which refers to the Regional Library Resource Center program should not be considered in isolation of these three.

INFORMATION ON TECHNOLOGY

Disseminate information to all libraries to identify resources and expertise needed to plan and implement technological changes.

A. Addressing the Problem

Major advances in technology are occurring that will enable librarians to make improvements in both organization and access to the huge volume of information being produced. Librarians need information on these developments so they can make intelligent decisions about incorporating such technology into the planning and implementation of their services. The Planning Council, therefore, has recommended that:

> The State Library should disseminate information to all libraries to identify resources and expertise needed to plan and implement technological change.

B. Intent of the Course of Action

Librarians need to learn about new technologies as they are developed in order to remain relevant to their communities and to make informed decisions. A number of agencies, organizations and individuals already keep up with the latest developments and can provide useful information. The State Library can be a broker to get the librarians with questions together with the people who have the answers.

C. Possible Implementation Activities

1. Identify, through the State Library, existing information resources on technology such as:

   a. Bibliographic resources.

   b. State Government resources including PENNTAP (Pennsylvania Technical Assistance Project).

   c. Library network resources such as PALINET (Pennsylvania Area Library Network) and PRLC (Pittsburgh Regional Library Center).

   d. Library association resources.

2. Increase the number of technology consultants contained in Pennsylvania Department of Education's database, Pennsylvania Educational Resource File (PERF), and expand its accessibility to include all types of libraries.

3. Widely publicize these resources.

Gary Bechtel, Elliot L. Shelkrot

Daryl Ellsworth

Appendix A

Planning Council and Steering Committee Membership

The Comprehensive Plan is the result of bringing together the leaders of as many statewide organizations as possible. These busy people devoted a great deal of themselves to put their best ideas before the Governor for the improvement of library services to the people of Pennsylvania.

Elizabeth S. Beckman

COMPREHENSIVE PLAN

PLANNING COUNCIL

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Anthony Aguirre College of Physicians Philadelphia	IV	Medical Libraries
Lois K. Albrecht* Chair, Steering Committee Harrisburg		State Library of Pennsylvania
Robert Allen University Park	VII	Pennsylvania Public Library Film Center
Patrick Ambrose Oakmont	II	Pennsylvania State Education Association
Mary Louise Anstine York	II	Advisory Council on Library Development
Gene Arnold Lancaster	I	Pennsylvania Junior Chamber of Commerce
Richard Barry* Bedford County Library System	III	Trustees of County Library Systems
Oliver R. Bartlett Tioga County Commissioner	II	Pennsylvania State Association of County Commissioners
Ivy Bayard Tyler School of Art Library Philadelphia	VII	Special Libraries
Kenneth E. Beard North Side Elementary School Harrisburg	V	Pennsylvania Associations of Elementary and Secondary School Principals
Gary Bechtel* Fairfield	III	Chair, Advisory Council on Library Development
Elizabeth S. Beckman* Erie	III	Advisory Council on Library Development

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Hillary Bitting* West Shore School District Lemoyne	I	Pennsylvania Learning Resources Association
Ruby Bowe Harrisburg	III	Department of Community Affairs
Emory Brown University Park	I	Pennsylvania State University Cooperative Extension Service
Scott Bruntjen Pittsburgh	IV	Pittsburgh Regional Library Center (PRLC)
Martha Bryer Camp Hill	III	Pennsylvania State Association of Township Supervisors
Rt. Reverend Monsignor Vincent L. Burns Overbrook	III	Advisory Council on Library Development
Michael Cariola Camp Hill	I	Blind and Physically Handicapped
John Cicco Cicco and Associates Murrysville	I	Small Business Consulting
Augusta Clark Philadelphia City Council	III	Pennsylvania League of Cities
Honorable Nicholas A. Colafella House of Representatives Harrisburg	III	Political Leadership
Linda Cook Northwest Tri-County IU 5 Edinboro	VII	Intermediate Unit/ Instructional Materials Services Directors
James Dailey New Castle Area School District	VII	School Media and Technology
Frank G. Daveler Public Library Huntingdon Valley	VII	Trustees of Small Public Libraries

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Peter Deekle Harrisburg Area Community College	IV	Community College Libraries
Ann deKlerk Bucknell University Lewisburg	VII	Private College Libraries
Anna H. Dinulos Lebanon School District	II	Pennsylvania School Boards Association
David Dodds WGAL-TV Lancaster	I	Pennsylvania Association of Broadcasters
Keith Doms* Free Library of Philadelphia	V	State Board of Education
Daryl Ellsworth Warren State Hospital	VI	Federal Advisory Council
Doris Epler* Harrisburg	V	State Library of Pennsylvania
Virginia Erland Himmelreich Memorial Library Lewisburg	IV	Small Public Libraries
Donald Fadden* Scranton	IV	Advisory Council on Library Development
Ida M. Findley Butler	III	Pennsylvania Federation of Women's Clubs
Ronald Fisk Wernersville State Hospital	IV	Institution Libraries
Stuart Forth Pennsylvania State University University Park	VI	Academic Libraries
Judith M. Foust* Harrisburg		State Library of Pennsylvania
Doris Freeman* King of Prussia	I	Pennsylvania Library Association (PLA)

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Nancy J. Friend Macungie	I	Pennsylvania Federation of Business and Professional Women
June Fulton College of Physicians Philadelphia	VI	Federal Advisory Council
Ruth Glosser Johnstown	V	Advisory Council on Library Development
Patrick M. Greene Harrisburg	IV	AFL/CIO of Pennsylvania
Beryl Gutekunst Maple Glen	II	American Association of University Women
Kay Haffey Pottsville Republican	VII	Pennsylvania Newspaper Publishers Association
Elsie Hart Philadelphia	V	Conference on Black Basic Education (COBBE)
Viola Hope Hetzel* West Shore Public Library Camp Hill	I	Federal Advisory Council
Debbie Hildreth West Green Junior Senior High School Royersville	II	School Libraries
David R. Hoffman* Harrisburg	VI	State Library of Pennsylvania
Honorable June N. Honaman House of Representatives Harrisburg	I	Political Leadership
William Johnston Central IU Phillipsburg	II	Intermediate Unit Directors Association
Matthew Kane* Altoona Area Public Library	II	District Library Center Consultants
William Kautz* Department of Education Harrisburg	V	Bureau of Academic Programs

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Barbara J. Keiser Monroe County Public Library	III	County Library Systems
Jill L. Kremer Theodore F. Jenkins Memorial Law Library Philadelphia	VI	Law Libraries
Helen Lamrey P.P.G. Industries Allison Park	I	Special Libraries
Gerald S. Lestz Lancaster	I	Advisory Council on Library Development
Robert Lewis Harrisburg	II	Pennsylvania Economy League
Michael Maloney Allison Park	VI	Student
Anthony A. Martin Carnegie Library of Pittsburgh	VI	Advisory Council on Library Development
James H. McCormick State System of Higher Education	II	Pennsylvania Association of Colleges and Universities
Mary Helen McHenry Sunbury	V	American Association of Retired Persons (AARP)
Sister Constance Melvin Marywood College Scranton	IV	School Library Educators
Joanne Miller Harrisburg	VI	Pennsylvania Congress of Parents and Teachers
Carolyn Milligan Coplay	V	League of Women Voters of Pennsylvania
Celeste DiCarlo Nalwasky* Peters Township School District Bridgeville	V	Advisory Council on Library Development
Sheldon Parker* Hershey	VI	Pennsylvania Public Television Network

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Raymond Reaves Pittsburgh	V	Planning Representative
Lucille Reilly Harrisburg	VI	Pennsylvania Congress of Parents and Teachers
James Reinmiller Hazelton Area Public Library	IV	Public Libraries
Douglas Richardson Harrisburg	V	Department of Public Welfare
Phyllis (Mascaro) Ruscella Pittsburgh	VI	Pennsylvania Federation of Teachers
Dorothy W. Russell Philadelphia	VII	Pennsylvania Area Library Network (PALINET)
Louis F. Sander* Northland Public Library Pittsburgh	VII	Trustees of Medium Size Public Libraries
William Schell Martin Memorial Library York	III	District Library Center Administrators
Thomas Schuerger Monroeville Borough Council	III	Municipal Officials
Melvina Scott Philadelphia	III	National Association for the Advancement of Colored People (NAACP)
Elliot L. Shelkrot* Chair, Planning Council Harrisburg		State Librarian
Shirley Sharp Harrisburg	VI	Department of Aging
Jule Shipman* Bethlehem	II	Pennsylvania Citizens for Better Libraries
Neal Shoemaker Allentown School District Allentown	III	School Administrators
Elizabeth Smedley Hummelstown	V	Pennsylvania State Association of Boroughs

MEMBER	ISSUE COMMITTEE ASSIGNMENT	REPRESENTATION
Judith Smith Camp Hill	I	Bureau of Correction
J. Otis Smith, Jr.* Cheyney University	V	Academic Faculty
Robert W. Sorrell Philadelphia	VI	Pennsylvania Council of Urban Leagues
Richard Spear Oil City Public Library	VI	Public Libraries
Kathryn Stephanoff Allentown Public Library	IV	Advisory Council on Library Development
Dennis Stuckey Titusville	II	Association of Pennsylvania Municipal Managers
Kris Subramanyam Drexel University Philadelphia	VII	Library Educators
Jack Van Newkirk York City School District	IV	Pennsylvania Association of School Administrators
Bernard Vavrek Clarion University	I	Center for Rural Librarianship
Sue Walker* School District of Lancaster East Petersburg	IV	Pennsylvania School Librarians Association
Virginia Walsh* Ridgway	I	Pennsylvania Chamber of Commerce
Saul Weinstein Edinboro University	IV	State System of Higher Education Libraries Council (SSHELCO)
Honorable Roy W. Wilt Senate of Pennsylvania Harrisburg	II	Political Leadership
Blanche Woolls* University of Pittsburgh	IV	Library Media Educators

* Steering Committee

Charles Peguese

Elizabeth Ann Funk, Matthew Kane

Appendix B

Issue Committees

Project Staff and Consultants

We have begun a process of cooperation that will continue on long after the original plan has been completed.

Matthew J. Kane

COMPREHENSIVE PLAN

ISSUE COMMITTEES

	Issue Committee	Chair	Staff Liaison
I.	Varying markets and their needs for library services	Virginia Walsh	Annette McAlister
II.	State aid and local support for libraries	Matthew Kane	Joseph Myers Neil Richvalsky Clare Zales
III.	Governance of public libraries, systems and districts	Richard Barry	Sally Trace Felix
IV.	Relationships among different types of libraries	Blanche Woolls	Charles Peguese
V.	Role of the Commonwealth in support of the services of different types of libraries	J. Otis Smith, Jr.	Elizabeth Ann Funk Doris Epler
VI.	Library service provided by the State Library	Sheldon Parker	Donald Brown David R. Hoffman
VII.	The impact of technology on library services	Louis F. Sander	Barbara Kastle

PROJECT STAFF - STATE LIBRARY

Judith M. Foust	Planning Operations Committee Chair
Lois K. Albrecht	Coordinator and Steering Committee Chair
Malie McLaughlin	Administrative Assistant
Atauar Faruquee	Arrangements Coordinator
Dona Sulpizio	Secretarial Assistant and Arrangements Secretary
Susan Smith	Secretarial Assistant

PROJECT CONSULTANTS - BUREAU OF PLANNING, RESEARCH, EVALUATION AND DISSEMINATION

Carole Bellew

Joseph DeAngelis

Grace Laverty

Alfred Myers

Alfonso Zawadski

Robert S. Lewis

Lois Albrecht

Appendix C

Mission Statement

Implementation of this plan will strengthen our library system, a very important — but sometimes unrecognized — educational and economic resource for Pennsylvania.

Robert S. Lewis

COMMONWEALTH OF PENNSYLVANIA
Pennsylvania Department of
Education
State Library of Pennsylvania
Box 1601
Harrisburg, Pennsylvania 17105

October 26, 1981

717-787-2646

COMPREHENSIVE PLAN FOR LIBRARY SERVICE

Introduction

The 1980's has become a decade in which the assumptions behind all public services are being re-examined. Are these services worthy of continued support? From what levels of government should the support come? What is the most economic way for that service to be provided?

Library service is not exempt from this process. With "1984" just around the corner and its potential of technological advance coupled with its nightmare of big brother's pervasive eye, the need to examine the support of Pennsylvania's rich information resources is even more true.

Last year Act 200 was passed by the legislature and signed into law. This provided immediate relief to over 500 public libraries which had received little or no increase in state aid for over five years. With the ceiling of the old law removed, Pennsylvania's public libraries received a 33% increase in state aid in 1981. This record for aid to public libraries fares pretty well in comparison to other states. Pennsylvania is fourteenth in the country on a per capita basis. But if the Library Code is an incentive program, why is Pennsylvania only 41st in terms of local aid per capita? Whose responsibility is local library services? What role should the state play for the remainder of this century? What about the counties? Municipalities? What direction should library services take in light of microwave communications and microcomputers?

The school library/media programs in the state are about to face a very critical period. Having received categorical aid in past years in the form of ESEA IV-B, next year the need for library materials must compete with a wide array of other local school district needs. Last year approximately $82 million went to support the school library/media center. How much will be spent this year? How much should be spent? Whose responsibility should it be? What connection should exist between the school library/media center and the other libraries in the area or in the state?

Comprehensive Plan for
Library Service

October 26, 1981

Some $70 million in federal, state and private money went to support the libraries in higher education institutions in the Commonwealth last year. Their vast resources comprise some of the wealth that makes Pennsylvania a leader in higher education. If this strength is to be maintained, how much will it cost in the future? If the academic libraries are to allow their materials to be borrowed by individuals and institutions outside the purview of that college or university, who should pay the bill?

Similar questions arise with the special libraries and institutional libraries. Does the business and commercial community have access to the information it needs for decision making? What is the state and local government responsibility for the library needs of these taxpayers? What is the business community's responsibility to public or academic library users? Do the handicapped and institutionalized receive the quality library service needed to meet their needs? Is meeting these needs a state or a local responsibility?

With the cost of library materials and services rising faster than the inflation rate, libraries are finding it impossible to "go it alone". Is resource sharing the most economic avenue to pursue? What steps should be taken to avoid unnecessary duplication? What is the connection between the various types of libraries? Should a delivery system be self-supported by the libraries who use it? Can greater use of electronic mail, telefacsimile transmission or microwave transmission help to reduce costs? How much networking and cooperation can we afford? How much can we not afford? What is the state's role?

Mission

Pennsylvania's vast library and information resources are indeed one of its greatest assets. But library service, just as all public services, must examine the path it has taken in the last five or so years, decide what is the best of what has gone on previously, and develop a comprehensive plan for library services that will address the needs of all Pennsylvanians in the next five years; the information rich as well as information poor; the scholar and the student; the school age child and the adult who may or may not be in school. All should have their library needs addressed by this comprehensive plan. It should focus on the service, support, role and governance of each type of library and on the network or combined efforts of these libraries which are necessary to provide efficient library service in an increasingly technological environment.

The State Library should direct this planning process and it should incorporate collaborative efforts of the Department of Education's Bureau of Planning, Research, Evaluation and Dissemination; representatives of all types of libraries (public, school, academic and special) and their governing bodies; other PDE staff; interested lay

and professional associations, state and municipal officials, and interested citizens.

This plan should:

1. identify resources and needs,
2. formulate goals,
3. develop plans of action,
4. build statewide support for implementing those action plans, and
5. evaluate implementation of the plans of action.

In the course of the planning process the State Library should address such issues as the following:

1. Varying markets and their needs for library services.
2. State Aid and local support for libraries.
3. Governance of public libraries, systems and districts.
4. Relationships among different types of libraries.
5. Role of the Commonwealth in support of the services of different types of libraries.
6. Library service provided by the State Library.
7. Impact of technology on library services.

The completed plan should set forth steps by which the State Library and other libraries can:

1. Expand partnerships between relevant departments in state, county and local government for the benefit of residents throughout the Commonwealth.
2. Marshal and direct information resources in ways that contain overall cost while maintaining quality services.

3. Provide greater access to the wide range of services and resources than is currently available.

4. Match services provided to the identified needs of clients.

5. Promote efficiency and quality in community level library and information delivery systems.

Elizabeth Beckman, Thomas Schuerger

Sue Walker, Celeste Nalwasky

Appendix D

Charges to: Planning Council Steering Committee Issue Committees

I was pleased to be a part of this planning process because the library is an essential part of our social and economic community.

Thomas R. Schuerger

February 9, 1982

COMPREHENSIVE PLAN

CHARGE TO THE PLANNING COUNCIL

The Planning Council is composed of representatives of organizations interested in library service as well as other statewide organizations and groups concerned with government, education, and civic action.

The Council will develop a comprehensive plan for library services in Pennsylvania. To accomplish this it will examine the current status of library services, identify resources and needs, formulate goals, develop plans of action, and build statewide support for implementing those action plans.

The process of developing an action plan should be completed by spring 1983.

The Planning Council will meet three times during the process year. Each member of the Council will work on an issue committee. It is expected that these committees will meet six to eight times to address specific issues.

February 9, 1982

COMPREHENSIVE PLAN

CHARGE TO THE STEERING COMMITTEE

The purpose of the Steering Committee is to provide direction to the Planning Council and make recommendations regarding the planning process and the content of the final plans of action.

To accomplish this they will coordinate the work of the Planning Council issue committees, receive draft documents, and recommend appropriate action to the Planning Council.

The Steering Committee will meet from six to eight times during the process year. It is expected that members will participate in each of these meetings, as well as meetings of the Planning Council and issue committees.

February 9, 1982

COMPREHENSIVE PLAN

CHARGE TO THE ISSUE COMMITTEES

The issue committees are small working units of the Planning Council. Each committee will recommend courses of action and an evaluation strategy on a specific issue. To achieve this they will examine current status and concerns of a library issue, identify areas for improvement, and determine information needs.

Each issue committee is composed of representatives from the Planning Council with a member of the State Library staff as liaison.

The committee will organize and elect a chair and recorder at its first meeting.

Appendix E

Comprehensive Plan Process Structure

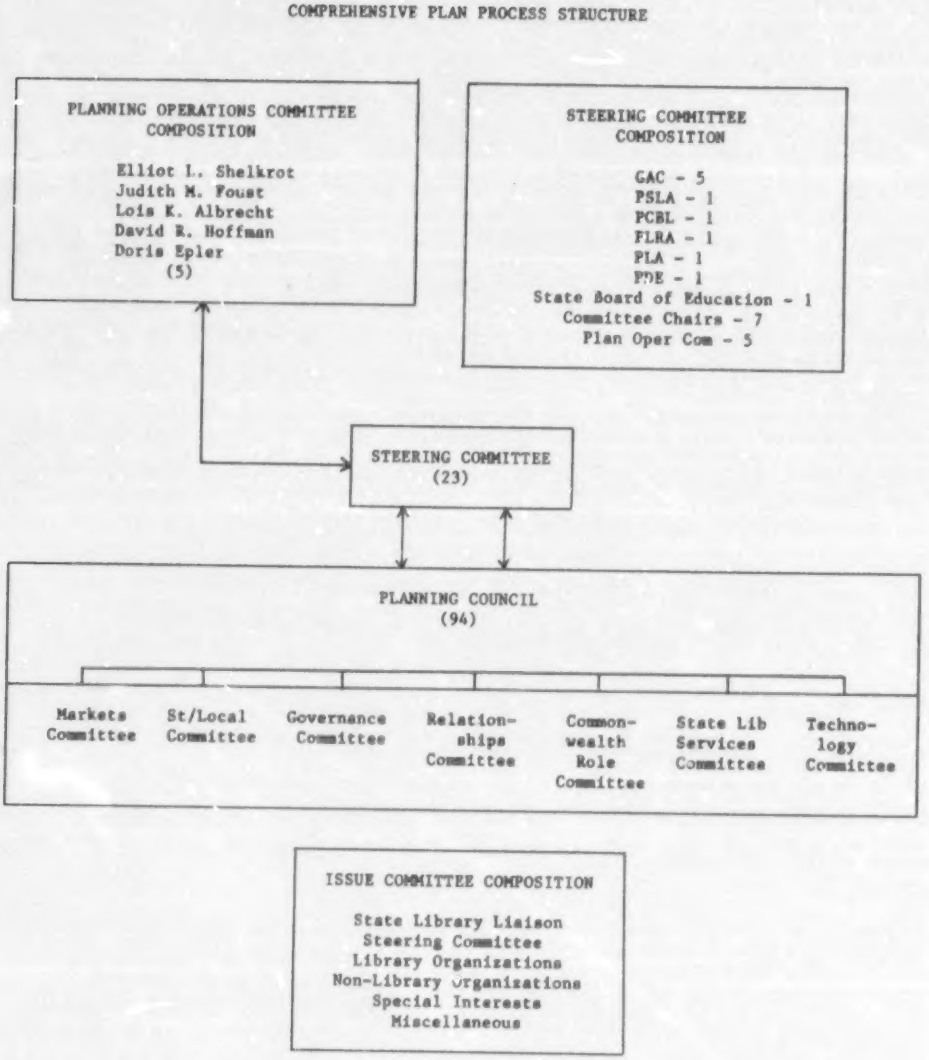
James F. Dailey

I believe that the plan has made great strides especially in recognizing the significance of technology in libraries during the next decade.

James F. Dailey

Raymond Reaves, Anthony A. Martin

COMPREHENSIVE PLAN PROCESS STRUCTURE



February, 1982

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Appendix F

Comprehensive Plan Calendar

Stuart Forth

Jule Shipman

Friends of libraries statewide can help to implement the practical recommendations resulting from careful consideration by prominent lay people, as well as professional library leaders to secure better library and information services for all citizens of the Commonwealth.

Jule M. Shipman

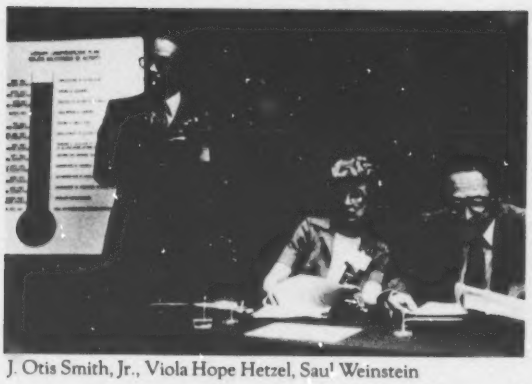
COMPREHENSIVE PLAN

Calendar

February 9, 1982	Steering Committee
March 11-12, 1982	Planning Council
April - May, 1982	Issue Committee Meetings
May 11, 1982	Steering Committee
June 4, 1982	Steering Committee
June 24-25, 1982	Planning Council
July - September, 1982	Issue Committee Meetings
September 15, 1982	Steering Committee
November 18-19, 1982	Planning Council
December 1-2, 1982	Steering Committee
January, 1983	Issue Committees refine action plans
February 1, 1983	Steering Committee meets to review first draft of action plans
February, 1983	Action plans are sent to field for reaction by end of February 1983
April, 1983	Issue Committees meet in mid-April to review field reaction
April 27, 1983	Steering Committee meets to review second draft of action plans
May 19-20, 1983	Planning Council final meeting
July 15, 1983	Steering Committee meets to review expanded courses of action
August 15, 1983	Comments received from Planning Council

Appendix G

Comprehensive Plan Survey



J. Otis Smith, Jr., Viola Hope Hetzel, Saul Weinstein

The emphasis on marketing library services to the users and incorporating technology to provide access to information and resources are key components of the plan. Viola Hope Hetzel

Sally T. Felix

State Library of Pennsylvania
Box 1601
Harrisburg, Pennsylvania 17105
February 22, 1983

717-787-2646

Dear Friend:

I am asking you to help me at a crucial point in the State Library's Comprehensive Planning process by completing the enclosed questionnaire and returning it in the postage paid envelope by March 8, 1983.

In 1981, Governor Thornburgh directed me to develop a comprehensive plan for library services from all types of libraries. To accomplish this we have been working with a 94 member Planning Council, representative of civic and cultural organizations, public officials, the school and the library communities.

Committees made up of Council members addressed seven issues. Problems related to these were identified and over 70 tentative courses of action were proposed to correct them. We are now at a point in our planning process where we must narrow the courses of action to produce a manageable set of action plans. This is where we need your help.

The problem statements and courses of action on the enclosed questionnaire represent ideas for which we need guidance. The organizations represented on the Council gave permission to select a random number of their membership to receive a questionnaire. Being able to identify responses by specific groups is critical in the development of our final action plans. Therefore the questionnaires are coded to identify your group.

Because some names appear on several mailing lists it is possible that you will receive more than one questionnaire. If so, please answer <u>one only</u>.

Ultimately, we hope to produce a set of action plans for the improvement of library services that will benefit the entire state. We feel that we cannot do this without you.

Thanks for taking the time to respond.

Sincerely,

Elliot L. Shelkrot
State Librarian

Enclosure

PENNSYLVANIA COMPREHENSIVE LIBRARY PLAN SURVEY

DIRECTIONS: Please read the problems and courses of action which follow. Then circle the response that indicates how important you feel each course of action is to improving library service in Pennsylvania.

QUESTION: HOW IMPORTANT IS IT THAT THE FOLLOWING COURSES OF ACTION BE TAKEN TO IMPROVE LIBRARY SERVICES IN PENNSYLVANIA? . . .

Very Important — VI; Important — I; Less Important — LI; Not Important — NI

Problems	Possible Courses of Action				
I. Library services are used by a small percentage of the potential clientele.					
	1. All types of libraries should use marketing (i.e., analysis of community need, identification of resources and services to meet the needs and promotion to increase awareness) to increase public awareness of library services.	VI	I	LI	NI
II. Funding authorities and the general public have not been convinced of the value and usefulness of libraries.					
	2. Library officials should stress the economic values of public library services to local government and the business community when seeking public funds for operating budgets.	VI	I	LI	NI
	3. The State Library Bureau should encourage the development of library and information services for local government and the business community to make them aware of the value of library services.	VI	I	LI	NI
	4. All libraries should develop strategies for the continuous involvement of funding sources in library planning.	VI	I	LI	NI
III. Few mechanisms exist to integrate marketing into all levels of library planning.					
	5. All libraries should be encouraged to do an ongoing assessment of their goals and objectives and how well they are being achieved.	VI	I	LI	NI
	6. A system should be established to recognize exemplary library marketing practices, processes and/or products in Pennsylvania.	VI	I	LI	NI
IV. Library service has not received adequate financial support from local communities. The economic impact and educational importance of libraries need to be examined and demonstrated.					
	7. The three mill ceiling on the amount of funds a municipal government can appropriate to a public library should be eliminated.	VI	I	LI	NI
	8. An assessment of a community's library needs should address the need for service to enhance overall education opportunities and assist economic growth and development.	VI	I	LI	NI
V. The current state aid program does not provide adequate basic support of sufficient incentive to encourage local library services for all residents of Pennsylvania.					
	The state aid program for public libraries should be modernized to:				
	9. improve the equalization aid component.	VI	I	LI	NI
	10. raise the base level of aid.	VI	I	LI	NI
	11. raise the minimum required level of local financial effort.	VI	I	LI	NI

	Very Important VI	Important I	Less Important LI	Not Important NI

Problems	Possible Courses of Action				
VI. Many library facilities, whether planned as libraries or adapted from a previous use, are so designed as to frustrate the effective delivery of services.					
	12. The State Library Bureau should provide guidance to communities on the design, planning, and construction/remodeling of facilities to be used as libraries.	VI	I	LI	NI
	13. A review of present and potential sources of funding for the construction or rehabilitation of libraries should be undertaken and communities should be advised of such sources.	VI	I	LI	NI
VII. No governmental agency is clearly responsible for establishing and funding public library services in Pennsylvania.					
	14. Local funding for libraries should be supplemented by enabling municipalities to utilize franchise fees and to provide financial incentives to corporations and individuals to support public library services.	VI	I	LI	NI
	15. Counties should be provided with greater incentives to assume responsibility for providing public library services.	VI	I	LI	NI
VIII. Insufficient knowledge of the library boards' responsibilities limits their effectiveness; these responsibilities should be clearly defined.					
	16. The State Library Bureau should develop a training program for library boards on the responsibilities of library trustees.	VI	I	LI	NI
	17. The State Library Bureau should work with the Department of Community Affairs to provide continuing education for municipal officials regarding library services.	VI	I	LI	NI
IX. Many public library boards are insulated from the needs of the community and the problems of libraries in meeting these needs.					
	18. All local public libraries should involve the community in developing long range plans.	VI	I	LI	NI
	19. A local comprehensive plan should be required of local public libraries as a condition for receiving state grants.	VI	I	LI	NI
X. The lack of a clear understanding of their relative roles by local public libraries, public library system and District Library Centers has led to inconsistent service policies, duplication of service and unnecessarily competitive relationships among libraries within the public library system.					
	Local public libraries and township public library systems should:				
	20. join a county library system as a condition for receiving state aid.	VI	I	LI	NI
	21. offer the most frequently requested materials and services wanted by their communities.	VI	I	LI	NI
	22. serve as a point of access for less frequently required materials and services.	VI	I	LI	NI
	County library systems should:				
	23. apply for and disburse state aid to all public libraries in the county.	VI	I	LI	NI
	24. establish and promote a standard of quality for local library service.	VI	I	LI	NI
	25. organize delivery services and interlibrary loan to local libraries.	VI	I	LI	NI
	26. organize a public relations program for local libraries.	VI	I	LI	NI

Problems	Possible Courses of Action	Very Important VI	Important I	Less Important LI	Not Important NI
	District Library Centers should:				
	27. offer a resource collection to libraries and residents of the district.	VI	I	LI	NI
	28. provide consultant service to libraries in the district.	VI	I	LI	NI
	29. plan participatively and report on the provision and cost of district service.	VI	I	LI	NI
	30. provide reference and information services to libraries and residents in the district.	VI	I	LI	NI
	31. serve as the liaison between local libraries and county systems.	VI	I	LI	NI
	32. organize the interlibrary lending program and delivery of service to county systems.	VI	I	LI	NI
	33. promote the use of technology among libraries in the district.	VI	I	LI	NI
XI. Ownership and professional parochialism have prevented librarians in different types of libraries from sharing resources.					
	34. Institutions which provide library education should revise their curricula to provide students with a better understanding of the operation of all types of libraries.	VI	I	LI	NI
	35. The State Library Bureau should exercise leadership in providing continuing education which provides exposure to all types of libraries.	VI	I	LI	NI
	36. The associations of the library and related media and information professionals should strive for better coordination of activities.	VI	I	LI	NI
XII. Many libraries have policies or operational procedures which restrict or limit effective resource sharing.					
	37. The State Library Bureau should serve in a leadership role in increasing awareness of existing resources in Pennsylvania libraries.	IV	I	LI	NI
	38. Financial incentives should be provided to encourage resource sharing among libraries.	IV	I	LI	NI
	39. The State Library Bureau should encourage all libraries to reexamine their resource sharing procedures and revise if necessary to permit easy access to all types of resources.	VI	I	LI	NI
XIII. Perceptions differ as to whether money can be saved by combining different types of libraries.					
	40. The State Library Bureau should make communities aware of the roles of different types of libraries and of the potential positive and negative effects of combining different types of libraries.	VI	I	LI	NI

		Very Important VI	Important I	Less Important LI	Not Important NI
Problems	**Possible Courses of Action**				
XIV. Political boundaries prevent some citizens from being able to borrow materials from free public libraries while forcing others to travel long distances when services are much closer.					
	41. The State Library Bureau should investigate the establishment of statewide access to all libraries, including the right to borrow materials from any publicly supported library in the Commonwealth.	VI	I	LI	NI
	42. The State Library Bureau should encourage multitype library systems as a means of providing library service to those who do not have access to a public library.	VI	I	LI	NI
XV. The state, in its endeavor to assure quality library services for the citizens of the Commonwealth, has developed regulations which have varying effects.					
	43. The State Library Bureau should study how effective state standards have been in assuring quality library services and revise or develop new standards where appropriate.	VI	I	LI	NI
XVI. Privately supported libraries, many of which represent collections of intense specificity, are not accessible to citizens who need such materials.					
	44. The State Library Bureau should seek revision of the Library Code to allow funding for all types of libraries in order to make their collections accessible to the public.	VI	I	LI	NI
XVII. Present funding levels do not permit many libraries to meet local needs. To meet these needs, a role for the state in locating and connecting resources should be explored.					
	45. A resource person should be available at the State Library Bureau to assist libraries in identifying and connecting with local funding sources.	VI	I	LI	NI
	46. A study should be conducted to explore means, including tax credits, through which corporations, industries and other private sources can be encouraged to support libraries.	VI	I	LI	NI
XVIII. The library which is part of the State Library Bureau is used by state employees, the legal community, students and the general public, but its materials, budget and staff are not sufficient to adequately serve all those who would use it.					
	47. This library should concentrate its direct library service effort toward meeting state agencies' information needs.	VI	I	LI	NI
XIV. All types of libraries rely on the State Library for interlibrary loan; Pennsylvania's public libraries make special use of the State Library in its role as a Regional Library Resource Center, but that use does not correlate with the subject responsibilities assumed under the program or the funding provided.					
	48. The regional library resource center program should be reexamined in light of changes in need and use since it was established.	VI	I	LI	NI
XX. The information explosion and technical advances in information storage and retrieval create new demands and opportunities for which many libraries are not prepared.					
	49. Libraries should be encouraged to reexamine their missions and budgets in the light of new technology and its impact on their services.	VI	I	LI	NI
	50. State and federal funds should be used to enable libraries to purchase technological systems and equipment.	VI	I	LI	NI

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	Very Important VI	Important I	Less Important LI	Not Important NI

Problems	Possible Courses of Action				
XXI. The growth of technology based information systems delivering to the home and work place (such as those using computers, telefacsimile, cable, satellite and video) may undermine support for libraries and cause persons without access to these more recent information systems to be unserved.					
	51. Library communication needs, voice, picture and other type of data transmission, should be reflected in current state planning and implementation.	VI	I	LI	NI
XXII. A growing need exists for information in locating, selecting and using technological systems and equipment.		VI	I	LI	NI
	52. Libraries should make materials and facilities available to help users learn about technology.	VI	I	LI	NI
	53. Training guides should be developed to cover such areas as video programming, computer usage and literacy, data searching and other technological skills needed by library staff.	VI	I	LI	NI
	54. Technology-related continuing education programs should be provided for staff of all types of libraries.	VI	I	LI	NI
XXIII. Many technological systems are not compatible with each other.					
	55. The State Library Bureau should assume a leadership role in encouraging library technological systems which are compatible.	VI	I	LI	NI

Thank you for your help. Please write any comments you wish to make in the space below.

Dennis Stuckey

Anthony Aguirre

Appendix H

Bibliography of Background Materials

I was pleased to be part of this planning process, because interlibrary cooperation, particularly in the area of technological innovation, is vital to the survival of universal library services, and affordable access to information. Ann M. de Klerk

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2. "State and Local Support of Libraries", by Joseph H. Myers and Neil Richvalsky
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4. "Relationships Among Different Types of Libraries", by Charles Peguese
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